

RECORDS MANAGEMENT EVALUATION GUIDE SHEET
FOR THE
CORRESPONDENCE MANAGEMENT PROGRAM

Revised
3/18/64

Item No.	Guide Post	Guideline	Evaluation Factors
C-1	AUTHORITY AND PROGRAM ESTABLISHMENT	DETERMINE IF A DIRECTIVE HAS BEEN RELEASED AUTHORIZING THE PROGRAM.	OVERALL EFFECTIVENESS OF THE DIRECTIVE.
C-2	ASSIGNMENT OF RESPONSIBILITY FOR PROGRAM DEVELOPMENT AND EXECUTION	REVIEW DELEGATIONS OF AUTHORITY AS SHOWN IN ORGANIZATION CHARTS, FUNCTIONAL STATEMENTS OR DIRECTIVES.	PERFORMANCE AT EACH LEVEL OF AUTHORITY AND THE APPROPRIATENESS OF THE ORGANIZATIONAL ALLOCATION.
C-3	FORMULATION OF POLICIES, STANDARDS, AND PROCEDURES	EXAMINE MANUALS, HANDBOOKS, AND OTHER GUIDES TO POLICIES, STANDARDS AND PROCEDURES. (DETAILS GIVEN IN C-4)	COVERAGE AND ADEQUACY OF EACH OF THE GUIDES. AVAILABILITY OF EACH TO USERS.
C-4	MANAGEMENT OF CORRESPONDENCE PRODUCTION	ANALYZE PUBLICATIONS, ASSEMBLED STATISTICS, AND COLLECTED COPIES OF OUTGOING CORRESPONDENCE	COMPLIANCE WITH STANDARDS AND PRESCRIBED PRACTICES.
	A. WRITING THE COMMUNICATION	ASCERTAIN USE OF "PLAIN LETTERS" OR ISSUANCE OF A SIMILAR HANDBOOK SETTING ACCEPTABLE STYLES OF WRITING. OBTAIN "FCG INDEX" READINGS OF OUTGOING LETTERS ON SAMPLE BASIS.	APPLICATION OF PRINCIPLES OF SHORTNESS, SIMPLICITY, STRENGTH, AND SINCERITY. RESPONSIVENESS TO THE INQUIRY. ACCURACY OF SUBJECT MATTER.
	B. PREPARING (TYPING) THE COMMUNICATION	CHECK ADOPTION OF THE <u>U.S. GOVERNMENT CORRESPONDENCE MANUAL</u> , WITH MODIFICATIONS AS REQUIRED, AND OR ISSUANCE OF AN AGENCY CORRESPONDENCE MANUAL ----- ALSO DETERMINE WHETHER THE <u>G.P.O. STYLE MANUAL</u> HAS BEEN ADOPTED FOR PRACTICES NOT COVERED IN THE <u>CORRESPONDENCE MANUAL</u> .	QUALITY OF ADAPTATION BY REVIEWING CHRONOLOGICAL OR DAY FILES, OR SAMPLES OF CORRESPONDENCE. ACCEPTABILITY OF PRESCRIBED PRACTICES. ----- UNIFORMITY IN TYPING PRACTICES, INCLUDING: PUNCTUATION, SPELLING, WRITING NUMBERS, AND SO FORTH.
	C. REVIEWING AND SIGNING	RECOGNIZE THE DEGREE TO WHICH THE SUBJECT GOVERNS NEED FOR REVIEW. ----- CHECK THE WRITTEN DELEGATIONS OF AUTHORITY TO SIGN CORRESPONDENCE ----- INVESTIGATE THE PRACTICE AND FREQUENCY OF CORRESPONDENCE REWRITES.	DEGREE TO WHICH SUBJECT MATTER AND REQUIREMENTS FOR REVIEW ARE CORRELATED. ----- POSSIBILITY OF FURTHER DELEGATION OF SIGNING AUTHORITY TO PERSONS HAVING IMMEDIATE RESPONSIBILITY FOR SUBJECT MATTER. ----- CAUSES OF REWRITES AND THEIR POSSIBLE ELIMINATION.
	D. HANDLING AND CONTROLLING COMMUNICATIONS	OBTAIN COMPILATION OF STATISTICS ON VOLUME OF CORRESPONDENCE AND ON SIGNIFICANT PRACTICES	USE, VALUE, APPROPRIATENESS, OR ADEQUACY OF EACH OF THE FOLLOWING AS REVEALED BY THE STATISTICS:

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	D. (CON'T)		<ul style="list-style-type: none"> -NUMBER OF LETTERS IN AND OUT. -FORM LETTERS USED -GUIDE LETTERS USED -COPIES CREATED -REVIEWS AND CLEARANCES REQUIRED -REWRITES REQUIRED -RATES OF PRODUCTION (LETTERS PER DAY AND SO FORTH), AND -LENGTH OF REPLY INTERVALS
	E. INCREASING EFFICIENCY AND CUTTING COSTS	<p>DETERMINE ADOPTION OF QUICK-TYPES OF COMMUNICATION</p> <p>ADOPTION OF SPEED AIDS AND ECONOMY MEASURES</p>	<p>USE OF:</p> <ul style="list-style-type: none"> -FORM LETTERS FOR REPETITIVE CORRESPONDENCE OF LARGE VOLUME -GUIDE LETTERS FOR REPETITIVE CORRESPONDENCE OF MODERATE VOLUME -2-WAY MEMO FOR BRIEF MESSAGES OF ROUTINE NATURE -LEAFLETS OR OTHER PRINTED FLIERS TO BE USED AS ENCLOSURES <p>USE OF:</p> <ul style="list-style-type: none"> -CORRESPONDENCE WHERE VOLUME OF FORM AND GUIDE LETTERS JUSTIFIES A FORMAL GUIDE TO THEIR USE -WINDOW ENVELOPES AS APPROPRIATE -BULK MAILING, ESPECIALLY TO FIELD OFFICES ← ELIMINATION OF UNNECESSARY ACKNOWLEDGEMENTS AND TRANSMITTALS NON-ESSENTIAL COPIES OF OUTGOING CORRESPONDENCE
	F. SELECTING SUPPLIES AND EQUIPMENT	<p>DEVELOP INFORMATION ON THE POTENTIALITIES OF OFFICE EQUIPMENT USAGE FOR APPROPRIATENESS</p> <p>CHECK AGENCY STANDARDS FOR SELECTIVE PROCUREMENT OF SUPPLIES</p>	<ul style="list-style-type: none"> -PROPER SELECTION AND EFFICIENT USE OF FAST COPY MACHINES, DICTATING EQUIPMENT, ELECTRIC TYPEWRITERS, AUTOMATIC TYPEWRITERS, COMPUTERS, AND SO FORTH <p>-----</p> <p>ACCEPTABILITY OF LETTERHEAD DESIGNS</p> <p>USE OF CONTINUOUS STATIONERY FOR FAST PRODUCTION</p> <p>USE OF PRE-INSERTED CARBONS</p> <p>CHOICE OF REPRODUCTION MASTERS TO SUIT REQUIREMENTS (SEE SDA WORKSHOP KIT FOR GUIDELINES)</p> <p>-----</p>
C - 5	TRAINING	EXAMINE TRAINING PROVISIONS AND PRACTICES FOR INDIVIDUAL TRAINING ALSO, CHECK DATES OF MOST RECENT	LEVEL OF TRAINING ATTAINED SHOULD BE EQUAL TO:

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C - 5 (CON'T.)	TRAINING IN CORRESPONDENCE MATTERS	FOR TYPISTS AND STENOGRAPHERS - THE SECRETARIAL PRACTICES WORK- SHOP (GSA) FOR WRITERS - PLAIN LETTERS WORK- SHOP (GSA) ADMINISTRATIVE PERSONNEL - PLAIN LETTERS AND CORRESPONDENCE MANAGEMENT WORKSHOPS (GSA).

GSA WASH DC 62-10282

REPORTING FACT SHEET - CORRESPONDENCE MANAGEMENT

Essential Components

1. Administration which includes Program Charter, Scope of Program, Organization and Staffing, Promotion of Program, and Management Controls.
2. Guidelines and Operating Controls which includes Manuals, Handbooks, and Other Issuances relating to correspondence.
3. Correspondence Practices which includes writing of Correspondence, Preparing the Communication, Reviewing and Signing, Handling and Controlling Communications.
4. Efficiency Measures which includes Use of Aids, Elimination of non-Essentials, Selection and Use Equipment and Training Personnel.

Component No. 1 - Administration, includes:

a. Charter

- Authority, law, directives or letter (from higher authority)
- Program Establishment directive (Issued to subordinate office)

b. Scope of Program

- Organization and Geographic coverage (Headquarters, bureaus, field, project offices, etc.)
- Program objectives (Improve quality, expedite processing, economy, etc.)
- Application of Program (To Professionals, administrative and clerical personnel, etc.)
- Exceptions, if any -

- b. Preparing the Communication
 - Typing
 - Proofreading
 - Rewrites and correction techniques
- c. Reviewing and Signing Communications
 - Need for Reviews (astudy by subject and/or addressees)
 - Levels of Review (Determination of need for several reviews)
 - Need for further signing delegations
- d. Handling and Controlling Communications
 - Priority assignments (Typists and Stenographers)
 - Time in and out goals (speeding processing)
 - Security precautions (safeguarding contents)
 - Backlogs

Component No. 4 - Efficiency Measures, includes:

- a. Use of Aids
 - Correspondex (Pattern Paragraphs)
 - Form Letters
 - Guide Letters
 - Enclosures (leaflets, publications)
 - Window Envelopes
- b. Applying Economy Measures
 - Fewer copies distributed (examination of need)
 - Unnecessary letters (acknowledgements and transmittals)
 - Control of Copying Equipment
- c. Selection and Use of Equipment and Supplies
 - Selection standards (Geared to needs)
 - Application and use (availability and stand by time)

d. Program Promotion

- Improving correspondence quality
- Cost reductions
- Speeding correspondence

e. Controls

- Personnel Utilization (Random sampling, overtime, etc.)
- Statistics and Charts (Correspondence volume, type, reviews, rewrites, productions, elapsed reply time, etc.)
- Program appraisal (self-evaluation of program effectiveness)
- Costing Operations (measuring expenditures against results)

Component No. 2 - Guidelines and Operating Controls, includes:

a. Manuals

- U.S. Government Correspondence Manual (with modifications)
- Agency Correspondence Manual
- GPO Style Manual (uniformity in typing, punctuation, spelling, etc.)

b. Handbooks

- Plain Letters
- Form Letters
- Guide Letters

c. Other Issuances

- Delegation of Authority (signing correspondence)
- Correspondence Reviews

Component No. 3 - Correspondence Practices, includes:

a. Writing the Communication

- Applying the 4-S principles (including Fog index)
- Accuracy of Subject Matter (Responsiveness to inquiry)

~~Maintenance~~

-Supplies; Procurement and Use (Letter heads, envelopes,
pre-inserted carbons, repro)

d. Training Personnel

-Training Provisions (Policy and authority)

-Training Practices (Orientation sessions for officials;
workshops for typists and stenos)

-Type of courses (Plain letters; Correspondence management, etc.)

-Activity (Latest instruction dates and participants
by occupation)